

 One
Joplin



Community Support Services of Missouri

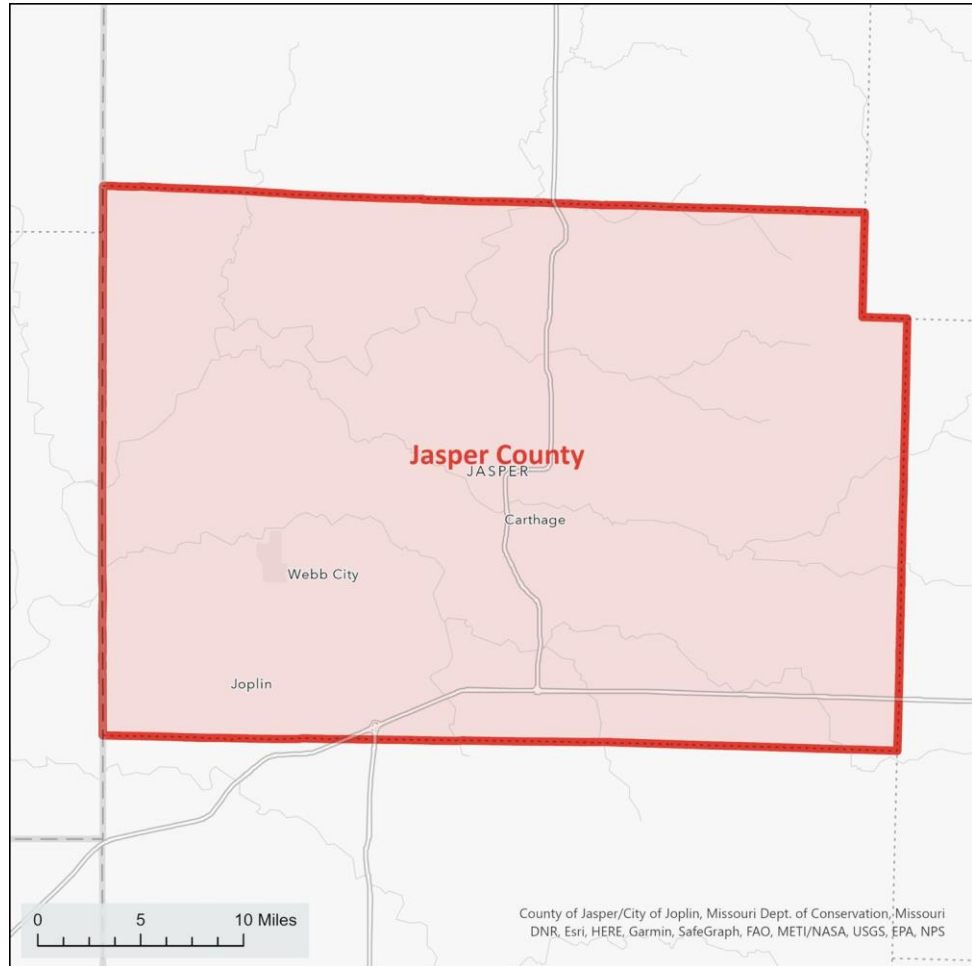
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Jasper County Community Team Meeting #2

01.31.24

Study Area

Jasper County



Phase I: Research & Community Engagement

- Community needs assessment
 - Supply and demand analysis
- Stakeholder survey
- Fiscal mapping and cost modeling

Data Overview

Data Sources

- Provider information
 - Child Care Aware list of providers
 - Economic Security Corporation for HS/EHS slots
 - Missouri DSS Block Grant Child Care Monthly Management Report for State Subsidy data
- Family need and workforce characteristics
 - American Community Survey 5-year estimates
 - Esri demographic estimates
 - Bureau of Labor Statistics Longitudinal Employer-Household Dynamics (LEHD)

Supply: ECE Provider Data

- Licensed (and regulated, license-exempt) capacity
- Estimated capacity for age groups 0-2 years, 3-5 years, and Pre-K
- Facility type
- Program(s) and Accreditations

Provider Information

NUMBER OF HOME-BASED PROVIDERS	NUMBER OF CENTER-BASED PROVIDERS	NUMBER OF ACCREDITED PROVIDERS
12	35	1

This table does not include Pre-K programs

Provider Capacity

	NUMBER OF SLOTS, TOTAL	NUMBER OF HEAD START/EARLY HEAD START SLOTS	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF ACCREDITED SLOTS
INFANT & TODDLER (BIRTH-2 YEARS)	966	94	69	49
PRESCHOOL (3-5 YEARS) <small>Preschool (age 3-5 years) includes Pre-K programs</small>	2,777	341	87	50

Demand: Family Need Data

- Total number of children 0-5, with Pre-K, 0-2, and 3-5 age groups broken out
- Estimated number of children qualifying for state subsidized care
- Estimated number of children qualifying for Early Head Start and Head Start programming
- Demand for care is based on 70% of total kids

Family Need

	NUMBER OF KIDS WHO NEED CARE	NUMBER OF KIDS IN POVERTY ELIGIBLE FOR HEAD START/EARLY HEAD START	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY
INFANT & TODDLER (BIRTH-2 YEARS)	3,556	962	1,547
PRESCHOOL (3-5 YEARS)	3,582	960	1,549

This table is based on the assumption that 70% of kids need care
Preschool (age 3-5 years) does not include Pre-K programs

Gap in Total Slots

	NUMBER OF SLOTS, TOTAL	NUMBER OF KIDS WHO NEED CARE	GAP IN SLOTS, TOTAL	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	966	3,556	-2,590	27%
PRESCHOOL (3-5 YEARS)	2,777	3,582	-805	78%
PRE-K (4-5 YEARS)	1,538	1,197	341	128%

This table is based on the assumption that 70% of kids need care

Pre-K (4-5 years) is a subset of Preschool (3-5 years)

Gap in Head Start & Early Head Start Slots

	NUMBER OF HS/EHS SLOTS	NUMBER OF KIDS ELIGIBLE FOR HS/EHS	GAP IN HS/EHS SLOTS	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	94	962	-868	10%
PRESCHOOL (3-5 YEARS)	341	960	-619	36%

This table is based on the assumption that 70% of kids need care

Gap in State Subsidy Slots

	NUMBER OF STATE SUBSIDY SLOTS	NUMBER OF KIDS ELIGIBLE FOR STATE SUBSIDY	GAP IN STATE SUBSIDY SLOTS	PERCENT SERVED
INFANT & TODDLER (BIRTH-2 YEARS)	69	1,547	-1,477	4%
PRESCHOOL (3-5 YEARS)	87	1,549	-1,462	6%

This table is based on the assumption that 70% of kids need care

Family Characteristics Data and Trends

- Household income
- Households with all parents working
- Total children aged 0-5
- How have these characteristics changed over time?

Household Characteristics

Median Household Income			Population 0-5			Children 0-5 with All Parents Working		
2016	2021	% Change	2016	2021	% Change	2016	2021	% Change
\$43,935	\$51,228	14%	9,498	9,409	-1%	6,364	6,169	-3%

Jasper County Workers

Live and work in Joplin	29,484	61.00%
Live in Carthage and work in Joplin	3,665	6.70%
Live in Webb City and work in Joplin	3,433	6.30%
Live in Joplin and work in Carthage	5,774	11.90%
Live in Joplin and work in Webb City	2,578	5.30%
Live in Joplin and work in Springfield	2,491	5.20%

Top Employers

#	Employer	# Employed
1	Freeman Health System	722
2	Leggett & Platt, Inc.	663
3	Mercy Health	495
4	Wal-Mart	441
5	Missouri Southern State University	410
6	Joplin Schools	268
7	Pittsburg State University Foundation	246
8	Eaglepicher Technologies, LLC	220
9	Tamko Building Products, Inc.	210
10	Schreiber Foods, Inc.	201

Survey Insights

Research Scope

This report focuses on qualitative community survey research focused on three groups of constituents in Jasper County:

Parents of children ages 5 and under (N=21 surveyed):

- Need for, current use of, and interest in early childhood education and care services;
- Awareness of assistance programs
- Preferences for child care type and location
- current challenges with accessing care
- Hopes for their children around ECE opportunities.

ECE Directors and Owners (N=8 surveyed):

- Experiences providing ECE services within the community
- Resources and support they would find most helpful
- Current challenges they are facing
- Licensed capacity vs enrollment
- If they have a wait list
- Questions to assess their facilities current indoor and outdoor quality

Employers (N=26 surveyed):

- Employee child care related issues and needs that impact them and their workforce
- Their potential interest in supporting ECE services

Executive Summary

Parents, ECE Providers, and Employers collectively play back a very consistent story of an under-resourced child care and early learning system in Jasper County:

- **Parents** face a series of challenges to finding satisfactory care. If care is readily available, it might not be affordable. Even parents who find care that they can afford, are creating imperfect 'solutions' by making major changes to their work and home lives.
- **ECE Providers** struggle to hire and retain staff without the ability to offer more competitive pay, which in turn leads to the shortage of care that parents experience. Even while the cost of care creates difficulties for families, the tuition that they pay is not enough to sustain operations.
- **Employers** feel the effects of these financial and practical child care challenges on their workers through increased requests for time off or even workers leaving their jobs entirely. The challenges for businesses that don't have a 9-5 schedule are especially pronounced in Jasper County. While most employers do not currently offer child care benefits to their employees, they do what they can with informal flexibility.

Parents cite affordability and waiting lists as top issues with finding providers.

Statement	% of surveyed parents who disagree or disagree strongly
There are plenty of affordable child care and early learning providers in my area	82%
It is easy to find a provider who does not have a waiting list for enrollment	82%
It is easy to find a provider who is affordable	64%
It is easy to find a provider who is conveniently located for my family	46%
It is easy to find a provider whose availability fits my schedule	36%
It is easy to find the right provider for my child(ren)'s needs	36%

Survey question: Please select the response that best matches your experience with finding a child care or early learning provider for your child(ren) ages 5 and under.

Parents find that even when care is available, quality can be low and paying for it can mean significant sacrifices.

While tuition varies significantly across families, the average monthly child care cost among surveyed respondents is ~\$870.

[I'm] a single mom who moved her mom and disabled brother into my house to be able to afford having my child in daycare.

Her first [of] daycare, my daughter (now 3) had a new "teacher" every six weeks because they couldn't keep staff, and there were 17-20 2-year-olds in one class with 2 teachers. It was always chaos.

My son started kindergarten this year. Last year, combined child care costs were our single most expensive budget item, more than our mortgage.

Open-ended responses to "What are the biggest challenges that you have faced when looking for child care or early learning providers? What are the biggest trade-offs you have made in response to these challenges?"

Nearly half of surveyed parents were unable to enroll due to a combination of cost and availability.

Among the 21 parents of children ages 5 and under who responded to the survey:

- 52% have their children enrolled in child care or early learning.
- 73% of enrolled families had children placed on a waiting list prior to enrolling.

Every daycare we looked into was going to cost us close to \$2,000 a month and had waiting lists for at least 2-3 months. None of them offered early enough drop to work with my teaching schedule and [husband's] work schedule.

Not enough affordable child care places..there are very long waiting [lists] so between the waiting list and prices a single [parent] can't afford them or they aren't available when you do need them if you can afford it.

The adjustments that surveyed parents make for child care cost money and extra coordination.

Overall, 90% of surveyed parents have made changes to their work lives or moved homes in order to accommodate their child care needs.

I have had to change jobs due to not being able to find sufficient daycare hours. When I finally did find daycare, as a single mom, I definitely paid more than I could almost afford to be able to work.

Thinking about the changes you may have made in order to accommodate child care availability, which of the following have you or another adult member of your household done for this reason?

Reduced working hours	33%
Changed work schedule without changing employers	33%
Switched jobs	29%
Left the work force to stay home with children	29%
Moved to a new home	5%

When asked about their biggest challenges, providers point to stretched staffing and escalating expenses.

Half of surveyed providers report that it is difficult or very difficult to find and retain staff, and a number mention the tough relationship between growing expenses and customers who can't absorb fee increases.

Trying to keep my prices affordable, but yet I need food and activities that cost more money all the time.

We are limited on funding to help offset the employee payroll compared to our admission rates, so our turnover rate due to not being able to pay more than minimum wage has been a challenge.

Inability to offer an attractive wage and inexperienced applicants are the barriers providers mention most.

Which of the following have you experienced with hiring and retaining staff during the last year in your child care or early learning location(s)? Please choose as many as apply.

Cannot afford to offer a wage that will attract applicants	38%
Applicants do not have the needed work experience	38%
Staff leaving to take positions elsewhere	25%
Not enough applicants for open positions	25%
Applicants lack needed training	13%

While providers report waitlists, they often operate below licensed capacity.

- 6 of the 8 surveyed providers report having a waiting list of children, echoing parents' experiences.
- Among the licensed providers surveyed, only 33% report operating at or near licensed capacity.

Enrollment is very close or exactly matched (within 5%) to licensed capacity	33%
Enrollment is slightly (up to 10%) lower than licensed capacity	0%
Enrollment is somewhat (10-20%) lower than licensed capacity	0%
Enrollment is much (20% or more) lower than licensed capacity	33%
Don't Know / Not Sure	33%

Quotes based on responses to: Please share more about any difference between the licensed capacity and actual enrollment at your child care or early learning location(s). What factors contribute to this difference?

Half of providers expect their enrollment to increase in the next few years.

- Half of the surveyed providers say they expect their enrollment to increase in the next 3-5 years.
- Providers with expansion plans mention dependence on successfully increasing staffing, while those who don't plan for growth cite license and facility capacities.

As we continue to hire more teachers, we plan to increase class sizes.

There is a huge demand for childcare in this area. MO laws should allow unlicensed providers to care for more than just 6 children due to this childcare demand.

69% of surveyed employers report a substantial impact to their business from employee child care access.

To the best of your knowledge, how much does your employees' access to child care affect your business? Impacts to consider include: challenges in hiring or retaining employees, scheduling difficulties, operating below full capacity, disruptions to your operations, etc.

Greatly - employees' access to child care causes major challenges for my business	23%
Significantly - employees' access to child care causes moderate challenges for my business	46%
Slightly - employees' access to child care causes minor challenges for my business	30%
Not at all - employees' access to child care does not cause challenges for my business	4%

Almost all surveyed employers report employees taking time off to care for children, sometimes permanently leaving their jobs.

Which of the following events, if any, has your company experienced during the past year, due to employees' access to child care?

Employees taking time off to fill child care gaps	81%
Employees terminating their employment	35%
Employees permanently changing their work hours / availability	62%
Employees trading shifts with co-workers, or otherwise temporarily changing their work hours / availability	62%
Candidates declining employment offers	40%
None of the above	15%

Our organization is open 24 [hours] a day, 7 days a week and there is no child care available from 6pm to 6am and on weekends. Family members try to help but that is usually time limited. The wait lists are long so employees usually end up bringing their infants/children to work with them which can be challenging and divides their attention.

Child care is too expensive for a single parent to afford. Most of the time, our employees want to work more hours, but have to weigh the cost of childcare, versus staying home and avoiding that cost.

Even with widespread challenges, 73% of employers identify as offering no child care benefits.

Which of the following child care benefits, if any, does your company offer to employees?	
None	73%
Other: Children permitted at work	12%
Other: FSA/Dependent Spending Account	4%
On-site child care facility	4%
Child care stipends / scholarships	4%
Off-site child care facility	4%

Fiscal Mapping & Cost Modeling

Fiscal Mapping

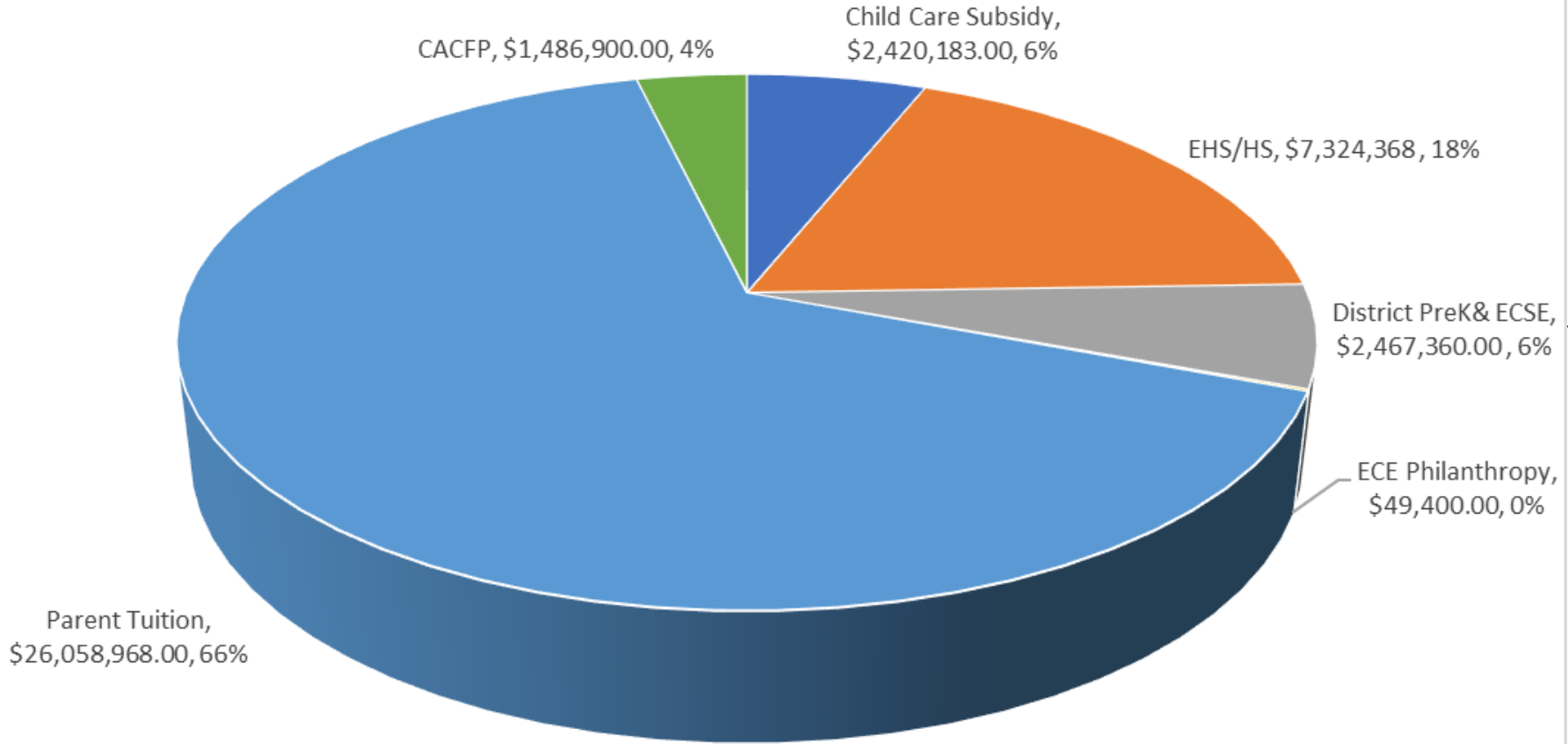
Data Sources

- Office of Childhood: Child Care Subsidy Monthly Management Reports
- Joplin School District
- Economic Security Corporation
- Department of Social Services
- Local ECE Provider data
- Missouri Market Rate Survey
- Candid: Philanthropy Database

Fiscal Mapping

- **Identified 7 revenue streams: child care subsidy, Head Start, public Pre-K/ ECSE, parent tuition, ECE-specific philanthropy, and Child & Adult Care Food Program (CACFP)**
- **Total Funding = \$39,807,179**

Jasper County ECE Funding, 2022



Total Funding = \$39,807,179

Fiscal Mapping

Average cost of parent tuition:

Local IT rate:
\$205.00/week (\$10,660.00/yr)

Local PS rate:
\$139.00/week (\$7,228.00/yr)

Child Care Subsidy Rates:

IT: \$200/week (\$10,400/yr)

PS: \$135/week (\$7,020/yr)

Philanthropy:

ECE-specific: \$49,400

Total: \$17,960,412.00

Cost Modeling

- Created 3 scenarios to represent the current system, including mid-sized, large, and FCC (baseline).
- Baseline models were built using both local provider data and default data for Missouri when local values were not available
- Salary ranges are based on local data:
Director: \$41,600; Lead Teacher: \$25,272; Assistant Teacher: \$24,960
- Tuition rates were based on average local provider data (IT \$205/week; PS \$139)

Cost Modeling

Mid-sized Center:

56 children total

16 IT

40 Preschool

***Baseline Models do not include health insurance, PTO, or other benefits or additional administrative support.**

***Assumes 90% enrollment efficiency & 1% uncollected revenue**

***Assumes 25% of children receive child care subsidy**

Net Revenue

Net Revenue	-\$51,685
Net Revenue as a Percent of Total	-11%

Cost Per Child

Cost Per Child 0-2	\$12,777
Cost Per Child 3-5	\$7,716
Staffed Capacity	56
TOTAL TEACHING STAFF	9.6

Cost Modeling

Large Center:

116 children total

24 IT

32 2's

60 Preschool

*Baseline Models do not include health insurance, PTO, or other benefits or additional administrative support.

*Assumes 90% enrollment efficiency & 1% uncollected revenue

*Assumes 25% of children receive child care subsidy

Net Revenue

Net Revenue	-\$31,658
Net Revenue as a Percent of Total	-3%

Cost Per Child

Cost Per Child 0-2	\$12,856
Cost Per Child 3-5	\$7,750
Cost Per Child 2-3	\$8,601
Staffed Capacity	116
TOTAL TEACHING STAFF	19.2

Cost Modeling

Home-based Program:

10 children total

4 IT

6 Preschool

*Baseline Models do not include health insurance, PTO, or other benefits or additional administrative support.

*Assumes 1 assistant in a 1500 sq ft home (80% space used for care)

*Assumes 90% enrollment efficiency & 1% uncollected revenue

*Assumes 25% of children receive child care subsidy

Net Revenue

Net Revenue	\$25,369
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Net Revenue as a Percent of Total	33%
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Cost Per Child

Cost per child average	\$5,168
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Cost Modeling

Takeaways

- Models impacted by compensation and staffing levels, preschool to infant/toddler ratios, size of the program, tuition rates, % of subsidized care, enrollment, & uncollected revenue (salaries and tuition rates are low locally)
- Models assume no additional revenue from sources such as philanthropy or businesses
- Opportunities to explore additional revenue as well as shared service approaches to decrease costs

Cost Modeling

Mid-sized “Plus” Center:

56 children total

16 IT

40 Preschool

*\$43200 for leads; \$15/hr assistants; MO director average. 3 weeks PTO, \$6500 health, \$1000/teacher for PD

*Assumes 85% enrollment efficiency & 1% uncollected revenue

*Assumes 25% of children receive child care subsidy

Net Revenue

Net Revenue	-\$400,233
Net Revenue as a Percent of Total	-101%

Cost Per Child

Cost Per Child 0-2	\$20,340
Cost Per Child 3-5 years	\$11,450
Staffed Capacity	56
TOTAL TEACHING STAFF	9.6

Cost Modeling

Large Size “Plus” Center:

116 children total

24 IT

32 2's

60 Preschool

*\$43200 for leads; \$15/hr assistants; MO director average. 3 weeks PTO, \$6500 health, \$1000/teacher for PD

*Assumes 85% enrollment efficiency & 1% uncollected revenue

*Assumes 25% of children receive child care subsidy

Net Revenue

Net Revenue	-\$686,897
Net Revenue as a Percent of Total	-80%

Cost Per Child

Cost Per Child 0-2 years	\$19,876
Cost Per Child 3-5 years	\$10,986
Cost Per Child 2-3 years	\$12,467
Staffed Capacity	116
TOTAL TEACHING STAFF	19.2

Appendix: Additional Survey Data

Snapshot: Types of Care and Ways of Finding Care among Surveyed Families

52% of surveyed parents have at least one child in center-based care, while only 9.5% have at least one child in home-based care

- 4.8% of surveyed ECE-enrolled families have children in a Head Start program
- 10% of families have children with unique needs or disabilities that require specialized care

How surveyed parents discover ECE providers in Jasper County

Recommendation from friend or family member
Google or other general online search
Older children previously cared for by same provider
Other (Please specify): School District
Child Care Aware
Facebook or other social media
Other (Please specify): Church
Other (Please specify): College
Other (Please specify): State inspections
Other (Please specify): the daycare is at my place of employment

Snapshot: Surveyed Family Work & Financials

- 81% of parents who participated in the survey are employed full time
- Surveyed families cover a wide spectrum of income levels and a mix of subsidy use:

\$20,000 or less	5%
\$20,001 to \$40,000	5%
\$40,001 to \$60,000	29%
\$60,001 to \$80,000	5%
\$80,001 to \$100,000	19%
\$100,001 to \$150,000	33%
\$150,000 to \$200,000	5%

No, my family does not qualify for a child care subsidy	65%
Yes, my family qualifies for a child care subsidy AND we use it	0%
I don't know / am not sure if my family qualifies for a child care subsidy	30%
Yes, my family qualifies for a child care subsidy BUT we don't use it	4%

Half of providers report that resources and support are stretched or scarce.

Which of the following statements best describes the level of resources and support available for programs and operations in your child care or early learning location(s)?	
Plentiful - there are more than enough resources and support for programs and operations, so I can afford some "extras"	0%
Great - there are consistently at least enough resources and support for programs and operations, so I can feel at ease	0%
Adequate - there are generally enough resources and support for programs and operations, though there is not generally anything to spare	50%
Stretched - there are consistently not quite enough resources and support for programs and operations, so I have to be careful in how I use them	38%
Scarce - there is nowhere near enough resources and support for programs and operations, and I regularly have to make trade-offs and sacrifices	13%

Responding providers all receive funding via tuition, but alternative sources are all also utilized.

What sources of funding do you use to sustain operations at your child care or early learning location(s)? Please choose all that apply.

Tuition paid by families	100%
Child care subsidy	50%
Private philanthropic grants or donations	25%
CACFP	13%
State Pre-K funds	13%
Loans / Lines of credit	0%
EHS / HS	0%

Despite uncertainty about increased enrollment, 87% of providers still plan some kind of investment.

Which of the following do you plan to do in the next 3-5 years? Please select as many as apply.

Purchase new educational materials	63%
Purchase new furnishings	63%
Renovate / make improvements to your existing facilities	50%
Expand capacity via added facilities or space	38%
Close your facilities entirely (e.g. to retire)	0%
None of the above	13%

Anticipated funding sources for improvements

Tuition paid by families	75%
Private philanthropic grants or donations	25%
Child care subsidy	13%
CACFP	0%
Loans / Lines of credit	0%
State Pre-K funds	13%
EHS / HS	0%

Snapshot: Surveyed Providers

Among the 8 ECE Providers who participated in the survey:

- 3 are Directors of a single center
- 5 are Owner/Operators

- 5 are center-based providers
- 3 is a home-based provider

- 3 are licensed by the Missouri Office of Childhood
- 3 are license exempt
- 2 are informal/unlicensed

Staff size that they lead ranges from 0-42, with a median staff size of 7

Active Professional Network Membership:

Facebook group for Child Care or Early Learning Providers	3
Family Child Care Network (through Child Care Aware)	0
Local Chamber of Commerce or Business Association	1
Missouri Association for the Education of Young Children (MOAEYC)	1
None of the above	4
Other Local Support Network	1

Snapshot: Children under Care of Surveyed Providers

- Among the 8 providers who participated in the survey:
 - 5 provide care for infants under 6 months
 - 6 provide care for babies ages 6-18 months
 - 7 provide care for toddlers ages 18 months-3 years
 - 6 provide care for pre-schoolers age 3-5 years
 - 2 provide after-school care for kids age 5 and over

Snapshot: Surveyed Employers

Industries work in:

Manufacturing / Industrial	1
Government	4
Non-profit Organization	11
Professional Services	2
Restaurant / Hospitality	3
Pre-K Education	1
Health care / Hospital	3
Grocery / Retail	1

Roles at organization:

Executive Leadership (C-suite)	7
HR / Talent Management / Recruitment	1
Supervisor (Director, Manager, Lead, or other role that supervises others)	17
Other (Please specify):Case Worker	1